

THE STATE BAR OF CALIFORNIA
Trusts and Estates Section
Presents

The Twenty-Ninth Annual Fall Program



September 30, 2005

World Trade Center

One Ferry Plaza

San Francisco, CA 94111

8:15 a.m. to 4:45 p.m.

**Online registration now available at
www.calbar.ca.gov/trusts**

7.0 CLE Units

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 7 hours.

THE TWENTY-NINTH ANNUAL FALL PROGRAM

Presented by
The Trusts and Estates Section of the State Bar of California

September 30, 2005 • San Francisco

World Trade Center • One Ferry Plaza, San Francisco, CA 94111

8:15 a.m. to 4:45 p.m. • Registration begins at 7:45 a.m.

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by September 10, 2005. **Please register early because space is limited.**

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

REGISTER ONLINE Online registration can be accessed at www.calbar.ca.gov/trusts. Deadline for registration is five (5) working days before the program.

ON-SITE REGISTRATIONS: On-site registration is on a space available basis only.

QUESTIONS: For registration information, please call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by September 15, 2005.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

PROGRAM AGENDA

8:15 to 10:15 Mediation in Contested Trusts and Estate Matters

Andrew M. Wallet, Esq., Hinojosa & Wallet

Janice Stone, Esq., Mediation Works, Inc.

Kay E. Henden, Esq.

Topics to be covered will include using mediation in pre-litigation and litigation matters; the mediation process; preparation; choosing a mediator; constructing a settlement; strategies; the Agreement; negotiation styles, etc.

10:30 to 11:30 Representing a Client Who is Both the Fiduciary and a Beneficiary of a Trust or Estate

Jeffrey A. Jaech, Esq., Baker Manock & Jensen

Kathleen Meehan, Esq., Baker Manock & Jensen

Recent developments: What estate and trust lawyers need to know about representing a client who is the fiduciary and a beneficiary of a Trust or Estate.

11:30 to 12:30 LUNCH (THERE WILL BE NO LUNCH PRESENTATION)

12:30 to 2:30 Recent Developments: Federal and California Cases and Legislation

James R. Birnberg, Esq., Oldman, Cooley, Leighton, Sallus, Gold & Birnberg LLP

Kim T. Schoknecht, Esq., Barulich Schoknecht Dugoni Law Group

Mary F. Gillick, Esq., Luce, Forward, Hamilton & Scripps LLP

Recent developments; what every estate and trust lawyer needs to know.

2:45 to 4:45 Alzheimer's Disease, Dementia and Other Conditions Affecting Capacity of Older Persons: Helpful Information for the Practicing Attorney

Bryan Kemp, Ph.D.

Michael Plopper, M.D.

Peter S. Stern, Esq.

Issues concerning the mental capacity of older individuals to enter into legal transactions are common. This presentation will focus on conditions that frequently impair capacity, how to determine the degree of capacity present and what resources the attorney may use in seeking answers to those kinds of questions.

REGISTRATION FORM

THE TWENTY-NINTH ANNUAL FALL PROGRAM

PRESENTED BY

THE TRUSTS & ESTATES SECTION OF THE STATE BAR OF CALIFORNIA

Note: One Registrant per form. Photocopies may be used.

State Bar Number _____

Name _____

Firm _____

Firm Address _____

City, State _____ Zip Code _____

Phone _____

Fax _____

E-mail _____

** Required for email confirmation*

Your Name and Address may be disclosed.

☐ Check here if you do not want your information released.

REGISTRATION FEES (Check the appropriate box)

☐ \$240 **Trusts and Estates** Section Member

☐ \$310 Non-Section Member
Includes enrollment in the Trusts and Estates Section for 2006.

CREDIT CARD INFORMATION

I/We authorize The State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

** VISA or MasterCard Only*

Card Holder's Name _____

Cardholder's Signature _____

DEADLINE In order to Pre-register, your form and check, payable to the **State Bar of California**, or credit card information, must be received five (5) working days before the program.

REGISTER ONLINE www.calbar.ca.gov/trusts

MAIL TO Program Registrations, State Bar of California, 180 Howard Street, San Francisco, CA 94105.

FAX TO Program Registrations at (415) 538-2368. In order to fax your registration, credit card information is **MANDATORY**. (*Photocopies of checks will not be accepted*).

CANCELLATION/REFUND POLICY All requests for refunds must be received in writing no later than September 10. Refunds will not be made for requests received after September 15, 2005.

THE TWENTY-EIGHTH ANNUAL FALL PROGRAM

This one day comprehensive program will include the following panels:

- Mediation in Contested Trusts and Estate Matters
- Representing a Client Who is Both the Fiduciary and a Beneficiary of a Trust or Estate
- Recent Developments: Federal and California Cases and Legislation
- Alzheimer's Disease, Dementia and Other Conditions Affecting Capacity of Older Persons: Helpful Information for the Practicing Attorney

